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Renewable Energy Valleys to increase energy security while accelerating the green transition in Europe - Innovation action (IA)



REFORMERS
RENEWABLE ENERGY VALLEYS

REFORMERS

Regional **Ecosystems FOR Multiple-Energy Resilient Systems**

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D1.4: PROJECT HANDBOOK



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EXECUTIVE SUMMARY

The Project Handbook, result of T1.2, describes all internal communication strategy, reporting (internal and external) procedures and guidelines, quality management, risk management, change management. It will provide all important channels (repository, contacts list, communication channels) and also available templates, supporting documents and all available information to ensure successful overall management.

Together with D1.1 Project Management Plan and D1.6 Data Management Plan, they constitute the main deliverables of WP1 Project Management and Coordination. These documents must always be used together with the reference documents found in Section 9. Conclusions.



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Acronyms	
CA	Consortium Agreement
WP	Work Package
PC	Project Coordinator
REV	Renewable Energy Valley
RE	Renewable Energy
SV	Satellite Valley
EC	European Commission



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1. INTRODUCTION

REFORMERS is a Horizon Europe funded project that aims to provide the tools and methodologies for the roll out of renewable energy valleys. The cooperation and coordination of 28 partners is of paramount importance to achieve this objective in full. To this end, D1.4 Project Handbook will provide the guidelines, procedures and tools to ensure administration and coordination is not a burden, but a facilitator.

D1.4 Project Handbook must always be used together with D1.1 Project Management Plan, as they are complementary documents. They are also living documents: D1.4 Project Handbook will be updated twice during the project duration, in order to keep it relevant and aligned with the project progress and implementation.

This report will introduce shortly the project in Section 2 before it moves to the actual content:

- In Section 3, internal communication tools will be presented and explained according to purpose and function.
- In Section 4, the Cooperation Tool 5 will be presented: this will be the main management tool of the project that will facilitate monitoring of project implementation and financial monitoring.
- In Section 5, a detailed plan of internal and official reporting and procedures will be presented.
- After that, Section 6 will explain the Quality Management and Section 7 the Risk Management.
- Finally, Section 8 will focus on the change management.
- The last Section, 9, will provide templates, supporting documents and the conclusions of the report.

2. PROJECT OVERVIEW

The EU energy system strongly relies on centralised electricity generation and on fuel imports, with 95% of its oil and 84% of its gas consumption sourced from outside the EU. The REPowerEU Plan proposes a set of actions to reduce the EU's dependence on fossil fuels and diversify its energy supply 'well before 2030'. The three pillars of the plan are to ramp up the production of green energy, diversify our energy supplies, and reduce our demand for fossil gas, coal and oil. Renewable energy valleys are understood as decentralised renewable energy systems that offer a viable and efficient solution to these challenges mentioned above. By implementing a high degree of renewable energy sources as well as storage technologies and intelligent management algorithms for synergetic use of a wide variety of technologies, they can be 100% self-sufficient on a yearly basis. For the next 5 years, the REFORMERS project aims to develop, implement and exploit such an energy valley in the Boekelermeer next to the city of Alkmaar in the Netherlands, that serves as a living lab for testing and validating technologies, business models, stakeholder ecosystems, including industrial partners, DSO, the municipality, and residents, and user acceptance in real-life circumstances, in a peri-urban and industrial environment.



Furthermore, the project aims to support the deployment of multiple self-sufficient energy valleys throughout Europe beyond the flagship in the Netherlands. Therefore, it will deliver a roll-out blue print and replication toolbox that encompass: (i) Energy System Design, (ii) Environmental Impact Assessment, (iii), Stakeholder Engagement and Social impact assessment, (iv) Governance and policy assessment, and (v) Business modelling, and allow other sites and regions to develop a pathway towards a carbon neutral and self-sufficient energy valley, that can be fed into e.g., a Sustainable Energy and Climate Action Plan.

These results will be realised through an implementation plan that breaks down the work into work packages and tasks:

WP1 Project management & coordination

T1.1 Project coordination, governance and strategic decision making

T1.2 Operational and financial management

T1.3 Data Management

WP2 Communication, dissemination & exploitation of project results

T2.1 Communication & dissemination plan and strategy

T2.2 Communication and dissemination activities

T2.3 Networking with other EU initiatives and relevant stakeholders

T2.4 Innovation management and exploitation planning

WP3 Setting up the Flagship Valley

T3.1 From planning REFORMERS objectives to KPIs selection and definitions

T3.2 Current flagship assessment and pathways forward

T3.3 Conceptual system design and scenario

T3.4 Data framework, collection, measurement tools and equipment

T3.5 Implementation plan

WP4 Implementation and Operation of Flagship

T4.1 FV Implementation and Operation Coordination Plan

T4.2 Implementation and Operation of REVT#1 to #3

T4.3 Implementation and Operation of REVT#4



T4.4 Implementation and Operation of REVT#5

T4.5 Performance monitoring

WP5 Digital Twin for Energy Valleys

T5.1 Digital twin requirements and initial architecture

T5.2 Energy data space: past, present, future

T5.3 Model development and calibration

T5.4 Digital twin services

T5.5 Validation in the field lab

T5.6 Digital twin blueprint

WP6 Energy Valleys Toolbox

T6.1 Energy system design

T6.2 Environmental impact assessment

T6.3 Business models, governance, and policy & legal assessment

T6.4 Stakeholder engagement and social impact assessment

T6.5 Training material for the toolbox

WP7 Replication assessment with Satellite Valleys

T7.1 Data collection and current status assessment

T7.2 Design and planning of the replication valleys' energy systems

T7.3 Ex-ante evaluation environmental impacts of the proposed solutions in the replication Valleys

T7.4 Definition of business models, regulatory assessments and governance of renewable energy Valleys

T7.5 Building Community understanding and capacity, and assessing social impact

T7.6 Putting training activities into practice at the SVs

WP8 Replication potential and pathways

T8.1 Flagship demo assessment and KPI Monitoring



T8.2 REFORMERS solutions cross-sectorial replicability

T8.3 Exploitation & innovation roadmap for supporting the deployment of REFORMERS solutions in Energy Valleys in Europe

T8.4 Long-term vision and policy recommendations

3. INTERNAL COMMUNICATION STRATEGY

3.1. Project contact list

The complete project contact list can be found on the landing page of Sharepoint/Documents, so that all Partners can easily access it. This list, an excel file, is a living file, kept updated at all times. The contact list is organised per partner and also indicated involvement of each contact in specific work packages.

It is the responsibility of each partner to keep their contact information up to date.

3.2. Main communication channels:

3.2.1. Electronic communication/ email and mailing lists

The main and official way of communication always remains the electronic communication through emails. It is of the outmost importance that all official communication is spread to the consortium using mails, also for the purpose of archiving. All information and documentation circulated through an email, is considered to be known and announced.

To facilitate this, and to avoid spamming, dedicated mailing lists will be set up per Work Package (and per task where needed/relevant). These will be developed through the Cooperation Tool 5 and will be kept up to date in accordance with the updates of the project contact list.

The project coordinator is responsible for keeping the mailing lists up to date.

3.2.2. Cooperation Tool

The [Cooperation Tool 5](#) has been chosen to be used as a management tool for REFORMERS, after an extensive market research. It brings together many advantages and supports both technical and financial monitoring and reporting and also storage space and communication tools. All functions (reporting, mailing lists) will be made available to the consortium.

3.2.3. Microsoft teams, WhatsApp, Telegram

As REFORMERS is being managed on a Work Package level, to allow flexibility and efficiency, each team can choose their communication tool of preference. At this time, apart from emails, several other tools are being used, e.g. Microsoft Teams, Telegram, WhatsApp,



Cooperation tool. Partners are in charge of ensuring security of information. The information and documentation shared through tools other than emails is not considered to have been officially circulated.

3.3. Meetings

As described in D1.1 Project Implementation Plan, the main meetings of the project are the ones of the project bodies, the General Assembly and the Executive Board. The details of the operation and meetings of those bodies are described in detail in the project Consortium Agreement.

The Executive Board meetings take place once a month and bring together the Work Package Leaders or at any point upon the request of an Executive Board member. The meetings are organised by the Coordinator and take place online.

The General Assembly meetings take place twice a year and at any time upon request of the Executive Board or 1/3 of the Members of the General Assembly. The face-to-face meetings are organised by the Coordinator and the hosting organization. A hybrid version of the meeting is possible, to facilitate all partners to participate.

In addition to those meetings, each Work Package leader will organise in parallel dedicated meetings to ensure proper implementation and monitoring of work. As the work progresses, meetings on task level might prove useful, but this is up to the respective task leaders.

3.4. Record keeping/Storage space

To facilitate record keeping and ensure all partners have access to official project documentation, a dedicated SharePoint has been set up and access has been provided upon request.

The structure is simple, to make the use of the folders efficient:

1. Admin, which includes basic templates and funding information.
2. Contracts, to safely store all project contracts (Grant Agreement, Consortium Agreement, annexes etc).
3. Workspace, where all partners can set up their own, separate folders to organise their work according to their preference.

A folder to store older, obsolete versions is present in each one of the folders.

SharePoint has been the main storage space since the beginning of the project. Once the Cooperation Tool 5 is fully set up, a decision will be made on the potential transfer of the files from SharePoint to the management tool.

4. MANAGEMENT TOOL

The [Cooperation Tool 5](#) is designed to offer all those digital services that a project as large as REFORMERS requires:



- Project coordination and technical management
- Financial management and administration
- Communication management and tools

Using the Work Package structure, the project will be easily monitored and support on time and high-quality results.

Guidelines are provided, as well as immediate user/technical support. Training on demand can also be provided.

5. REPORTING

5.1. Official Reporting

According to the Grant Agreement, REFORMERS will be reporting on its activities every 15 months, as shown in Table 1. At the end of each reporting period, the Consortium has two months to prepare the Periodic Report and submit it to the EC Platform. A review meeting will follow the submission and after the procedure is concluded (submission, review meeting, approval of periodic report) a payment will follow.

To ensure the reporting is done properly and efficiently, all partners will submit their information and input on time and according to the schedule that will be agreed upon. Each partner is responsible for their own contribution. Each Work Package Leader is responsible of reporting on the progress of the respective WP. The project coordinator is responsible of compiling the input of all partners and of finalizing the Periodic Report.

The reporting is done on three levels:

1. Continuous reporting, which is done by the coordinator through the EC Platform. This refers to information such as researchers participating in the project, deliverables submission, milestones achievement, risk monitoring, publications, communication and dissemination activities, impact, IPR and standards (where applicable)
2. Financial reporting, which is done by each Partner on the EC Platform. The required data includes effort per WP, and total expenses per budget category. In some cases, justification is required.
3. Technical reporting, which brings together the description of work of all WPs. WP leaders are in charge or presenting the work done and the coordinator compiles the description in one document, the technical report. Additional information required: DMP updates, impact monitoring, deviations.

Table 1 – Project reporting periods and review meetings

Reporting Period	Duration	Preparation of report	Review meeting (tentative dates)
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RP01	M1-M15 November 2023-January 2025	M16-M17 February, March 2025	M18 April 2025
RP02	M16-M30 February 2025-April 2026	M31-M32 May, June 2026	M33 July 2026
RP03	M31-M45 May 2026-July 2027	M46-M47 August, September 2027	M48 October 2027
RP04	M46-M60 August 2027-October 2028	November, December 2028	January 2029

5.2. Internal Reporting

In order to ensure sound financial monitoring and also to allow partners to review their financial data before any periodic report, all partners are required to submit an internal financial report every six months. The report will be simple and only require data on effort spent in each semester (in person months) and on direct costs spent during the specific semester. The coordinator is responsible for gathering all data, compiling them into one file. A template with instructions will be provided.

The schedule of the financial reporting is presented in Table 2.

Table 2 – Internal financial reporting

Reporting Period	Duration	Deadline to submit
1 st internal report	M1-M6 November 2023-April 2024	M7 May 2024
2 nd internal report	M7-M12 May 2024-October 2024	M13 November 2024
3 rd internal report	M13-M18	M19



	November 2024-April 2025	May 2025
4 th internal report	M19-M24 May 2025-October 2025	M25 November 2025
5 th internal report	M25-M30 November 2025-April 2026	M31 May 2026
6 th internal report	M31-M36 May 2026-October 2026	M37 November 2026
7 th internal report	M37-M42 November 2026-April 2027	M43 May 2027
8 th internal report	M43-M48 May 2027-October 2027	M49 November 2027
9 th internal report	M49-M54 November 2027-April 2028	M55 May 2028
10 th internal report	M54-M60 May 2028-October 2028	November 2028

6. QUALITY MANAGEMENT

6.1. Quality of deliverables and results

For REFORMERS, working together is of vital importance: the quality management has been set up to facilitate cooperation and develop procedures that will improve the overall results and outputs of the project. The guidelines of the quality management will ensure that all results and deliverables are of the highest quality, in accordance with the resources available.

6.1.1. Deliverable review procedure



The review procedure, as it was presented and approved at the kick-off meeting, includes the following steps:

Step 1: The deliverable is sent to reviewers four weeks before the contractual submission date.

Step 2: reviewers have eight working days to complete the review and send it back.

Step 3: The responsible partner integrates comments and prepares the final version (5 working days); the final version is sent to the Coordinator.

Step 4: last review of document from the Coordinator (5 working days) and submission.



Figure 1 – Deliverable review procedure.

6.1.2. Scientific publications review procedure

REFORMERS implementation will produce at least 7 open access peer-reviewed publications¹. The Partners will work together not only in realizing them, but also in reviewing them and ensuring excellent quality. For this reason, the *Scientific Quality Assurance committee* is set up by three members, coming from the academic and research partners (VUB, NEC, AIT, CERTH, CIRCE, RISE, TNO, TU DELFT, EMPA). The Committee is permanently presided by VUB (permanent member); two other members, coming from the aforementioned partners, will alternate as members.

Each publication will be sent to VUB, (before the peer review process) which will invite two representatives of non-authoring or co-authoring academic and R&D partners.

The review of the scientific publications will be implemented based on specific criteria:

- Ensure FAIR principles are respected² according to D1.6 DMP.
- Respect of confidentiality and privacy rules and regulations (personal data, restricted info), according to D1.6 DMP.

¹ D2.1 REFORMERS Communication and Dissemination Plan

² <https://open-research-europe.ec.europa.eu/for-authors/data-guidelines#standardsandfair>

- Ensure both EU and SERI funding and project are properly referenced and EU logo prominent in all published materials.
- Ensure overall context of publication is in line with project scope and objectives.

The overall responsibility of content remains with the authoring and co-authoring parties.

6.1.3. Templates

To support and facilitate the documentation of the project, specific templates will be developed from the Project Communication Manager (Deep Blue) in cooperation with the Project Coordinator (VUB). The standardization of the documentation ensures the correctness of contractual information as well. The deliverable/word template and presentation/PowerPoint template are already available on [SharePoint](#) and they will be periodically updated if the need emerges. All partners shall adopt the latest template versions in order to avoid discrepancies across documents.

7. RISK MANAGEMENT

A dedicated project Risk Management has been developed with the purpose of reducing the chances of risk materialization but also of mitigating risk impact. The basic steps of the risk strategy are as follows:

Step 1: Identify risk

During proposal development, the partners already named a number of risks that could potentially interrupt project implementation. Those risks are closely monitored to minimise percentage of realization, but a mitigation plan already exists to minimise impact in case of realisation.

However, unidentified risks can always occur during project implementation; those will be also introduced into the [risk log](#) and will be monitored according to the procedure described here. The risk log will be updated at every project meeting (Executive Board, General Assembly).

Step 2: Analyse, evaluate and mitigate.

All risks, regardless of timing of identification will be part of the risk log. Each risk will be described (likelihood, severity, opportunity, or barrier) and accompanied by a mitigation response by the partner in charge or/and responsible.

Step 3: Monitor

The partner that is in charge and/or responsible of each risk (pre-identified or new) is also in charge of monitoring it and reporting on it to the Executive Board. Each risk needs to be monitored on each step (identification, description, realization or resolution, application of mitigation plan, results).

8. CHANGE MANAGEMENT

Change management allows partners to adjust and adapt the implementation plan and resources to the actual circumstances and conditions. Normally, from the time a proposal has been written until the time implementation can begin, conditions have changed (market conditions, working conditions, technological developments etc). Change management will be applied in REFORMERS to allow swift adaptation to updated circumstances.

In principle, this refers to the Grant Agreement, as the main contract of the project. Change management can also be applied to the Consortium Agreement; the Project Coordinator with their legal department will lead this procedure. For the Grant Agreement amendment, the European Commission will guide and advise the Consortium and they will lead the procedure. The European Commission can always refuse to implement an amendment, depending on the impact, budget ceiling, etc.

Changes that do not require an amendment of the contract are minor changes and can be reported during official reporting as deviations:

- Internal allocation of effort of resources, without changes in Description of Work
- Allocation of effort of resources between partners, without changes in Description of Work

Some of the changes that require an amendment (major changes):

- changes to the description of the action in Annex 1
- activation of the contingency reserve (where foreseen in the grant agreement)

9. CONCLUSIONS

The Project Handbook offers simple guidelines and procedures in order to simplify day-to-day implementation and also to ensure contractual obligations and requirements. The Handbook is to be used together with D1.1 Project Management Plan and also with the following supporting documents:

- [Horizon Europe Annotated Model Grant Agreement](#) (AMGA): a guide to help users understand and interpret their Grant Agreements
- [Horizon Europe Online Manual](#): a detailed, step-by-step online manual to funding and project implementation
- [Horizon Europe Reference Documents](#): all relevant documentation, e.g legal, contractual, call documents, etc
- [Horizon Europe Reporting Template](#): the template of the official reporting, with explicit guidelines

